

Administrator Step-by-Step Guide



RevCom Roles - Glossary

Administrator - *Loads and manages documents, maintains user accounts*

Author (Writer, OPI, PA) – *Provides original and updated document versions to Administrator. Respond to comments provided in RevCom*

Coordinator (POC, DPC, TSM, PPC) – *Submits the official position of their organization through the review, edit and consolidation of local comments. Assigns reviewers and delegates.*

Delegates - *Aides Coordinator in review, edit and consolidation of local comments. Recommends comments for inclusion in official submission.*

Subject Matter Expert (SME, Reviewer) – *Reviews a document and enters applicable comments in RevCom.*

Monitor – *Read-only role views “birds eye” status of all system documents.*



Administrator Tasks

- Upload and parse documents
- Create and assign users
- Create activities and workflows
- Set due dates
- Generate automatic notifications

Login to RevCom

Choose your installation

www.revcom.doe.gov

 <p>Department of Energy Directives Managed by the Office of Information Resources</p>	<ul style="list-style-type: none">• RevCom for Draft Directives• RevCom Archives• Directives Website
 <p>Department of Energy Technical Standards Program</p>	<ul style="list-style-type: none">• RevCom for Draft Technical Standards• Technical Standards Website
 <p>Energy Efficiency and Renewable Energy Building Technologies Program Appliances & Commercial Equipment Standards</p>	<ul style="list-style-type: none">• RevCom for Energy Efficiency Standards• Appliances and Commercial Equipment Standards Website
 <p>Los Alamos NATIONAL LABORATORY EST. 1943</p>	<ul style="list-style-type: none">• RevCom for Draft Policies and Procedures• LANL Policy Office Website• LANL Prime Contract Office

Choose Administrator

Click here

Comment on Draft Documents

Comment on draft documents open for comments.

Consolidate Comments

Consolidate comments that have been submitted for your organization and create your comments

Respond to Comments

Respond to comments on your documents that are submitted to you from reviewers.

Administrator

Set up or change the review for one or more documents, set up user accounts, assign users and organizations to review documents, set or change due dates, send notifications to reviewers, and more.

Monitor

Track the status and metrics of documents in the system.

Help and Support

Read online help, download user guides, and contact Technical Support.

Login

Please enter your username and password as the document type admin.

Username:

Password:

Login

Login to RevCom with your unique Username and Password.

If you do not have a Username and Password, contact Client Services at 505-412-4120

Menu

Document	Accounts	Reports	Tools	Help
New Select	Create User Edit/View User	Custom	Manage Participants	RevCom Help About Doxcelerate
Exit	Create Organization Edit/View Organization	Performance Measures Document Status	Manage Activities	
		Planner	Manage Workflows	
		Deactivated users	System Labels Response Labels Comments Labels Link Builder Secure Domains	
			System Settings	
			System Reports	


Become very familiar with your RevCom Menus.

Document List

Document	Accounts	Reports	Tools	Help																
User: AdminBen - BensDocType Administrator - Document List																				
<p>The document list is organized into two sections, the active workflow at the top and the completed workflow at the bottom. The active workflow section is subdivided by activity status where the activity name is a link to the activity status screen. The completed workflow section is subdivided by document status, Final only workflow status screen with each activity a link to the activity comment report.</p> <p>Key: = needs attention = running = waiting = done = workflow status</p>																				
<p> none.</p>																				
<p></p> <table><tbody><tr><td>11/21/2005</td><td> General Review</td></tr><tr><td>11/21/2005</td><td> All Department Review</td></tr><tr><td>11/21/2005</td><td> Super Dpt Review</td></tr><tr><td>11/16/2005</td><td> General Review</td></tr><tr><td>11/14/2005</td><td> Super Dpt Review</td></tr><tr><td>11/11/2005</td><td> Super Dpt Review</td></tr><tr><td>10/19/2005</td><td> All Department Review</td></tr><tr><td>07/18/2005</td><td> Review Process</td></tr></tbody></table>					11/21/2005	General Review	11/21/2005	All Department Review	11/21/2005	Super Dpt Review	11/16/2005	General Review	11/14/2005	Super Dpt Review	11/11/2005	Super Dpt Review	10/19/2005	All Department Review	07/18/2005	Review Process
11/21/2005	General Review																			
11/21/2005	All Department Review																			
11/21/2005	Super Dpt Review																			
11/16/2005	General Review																			
11/14/2005	Super Dpt Review																			
11/11/2005	Super Dpt Review																			
10/19/2005	All Department Review																			
07/18/2005	Review Process																			
<p> none.</p>																				

The status of a document is identified by icons

Icons

 = needs attention


-**Needs attention** indicates that the set-up is incomplete

 = running

-**Running** activities are currently open in RevCom

 = waiting

-**Waiting** activities are those where the set up has been completed, but the open date has been set to automatically open some day in the future.

 = done

-**Done** indicates activities that have closed. These activities can be reopened, but all later activities in the workflow will need to be adjusted first.

 = workflow status

-Clicking on the title of the **Workflow Status** takes you to the entire workflow display. Each activity will be marked with one of the icons above to reflect the status within the workflow.

Create Your Organizations

**Create new organizations using
Accounts >> Create Organization**

Name: (Name of a field office, a department, etc.)

Email Domain: (In this format: yourAgency.gov or yourCompany.com)

Parent Site: Please select the parent organization of the organization being defined.
 ▼

Design a hierarchical structure for the user accounts (organizations) in your RevCom installation by creating and choosing parent organizations.

Create a flat structure or top level account by choosing “None.”

SET-UP

Create Users

To create a new User Role,
first fill in the following fields to define a new User Role:

RevCom Username: (blank space in name n

Full name:

Email:

Copy-to Emails: (if

RevCom Password:

Password Again: (to confirm the password

Create Accounts for:

Administrators

Authors

Coordinators

Monitors

(See 'RevCom Roles - Glossary' for clarification)

Accounts >> Create User

Then choose the role and organization for the new User Role:

- ☐ Administrator (initiate review, maintain accounts, admin reports)
- ☐ Author (respond to comments)
- ☐ Coordinator
- ☐ Monitor

Organization: Please select the organization of the user being defined

Create

Cancel

**Assign new users to an
organization and click "Create"**

Activity Templates

Design activity templates using

Tools >> Manage Activities

Create a new activity template or select an existing one:

New: **Create**

Existing:

- Initial Review - Screening Committee
First review of a document
major editorial and conceptual
broad review base.
- Broad Review and Response**
Broad review of the document
input. The Writer will respond via
- Committee of experts for...
sending out to a

Name your activity. The “Activity” name will be used at the end of the complete Version title to identify the version (phase) of the review process (Workflow) with which we are to associate the loaded document.

Once an activity template is created, you may edit it, delete it or use it as a base for a new template.

SET-UP

Activity Templates (cont.)

Activity: Initial Review - Screening Committee
Last Updated: 04/02/08 08:51 AM
Updated by: Julie Campbell



Assign Writer

Marge Greeson



Assign Participants

6 Organizations



Setup Notification

Messages set; em

Activity templates are used to pre-select settings for an activity type

- Author/Writer

- Participant List

- Notification Configuration

Description:

First review of a document by a small committee of experts for major editorial and conceptual changes prior to sending out to a broad review base.

Describe your Activity here then click "Save"

Save

as

Initial Review - Screening Coi

Save & Rename

as

SET-UP

Assign a Writer to a Template

Activity: General Review

Author: Super Department's Author

Change the Author by selecting a user below:

Super Department

Super Department's Author

Department Number Two

Department's Author

Sponsored by the US Department of Energy Building Technologies Program.

Operated by Doxcelerate Corporation

RevCom issues, problems: support-request@doxcelerate.com

Click on the name of the Writer to assign that individual to the Activity template.

SET-UP

Assign Participants

Phases:

1 Review ☒ 2 Response

Select “Response” to create a response phase for this activity template

Participants:

☒ Select All

Clear All

Select Levels:

☒ All 1 ☒ All 2 ☒ All 3 ☒ All 4

Select the level of participants for this review

☒ Super Department SuperCoord

☒ Department Number Four Department 4 Coord

☒ Sub-Department Four Sub-Department 4 Coord

☒ Sub-Sub-Department Four Sub-Sub-Department 4 Coord

☒ Department Number One Department 1 Coord

☒ Sub-Department One Test Coord For Sub Department 1

☒ Sub-Sub-Department One Sub-Sub-Department 1 Coord

☒ Department Number Three Department 3 Coord

☒ Sub-Department Three Sub-Department 3 Coord

☒ Sub-Sub-Department Three Sub-Sub-Department 3 Coord

☒ ADA Ben

Click assign to save your selections for this Activity template. When you open a new document – even if you choose this activity template – all of these options can be edited and changed prior to opening the activity. Templates are just tools to get you started.

Assign

Assign the above participants to this activity: **General Review**

Setup Notifications

Activity: General Review

To set the email notification mode and any custom message content, click Apply near the bottom of this page.

Email Mode: (How should the email notifications be sent once the document associated with this activity becomes open ?)

☒ Automatic ☐ Manual

Message Content:

Below are the messages that will be sent to the different users when the document becomes open. You may add text using the text area below. You may save this text for subsequent messages by checking the Set As Default box.

Author Email:

RevCom: Due Date Set or

This is to inform you that the document is open for review and comment in RevCom.

Document Type: BensDocTy

Document: General R

Open Date: [not set]

The date comments are due is

The deadline for you to complete comment resolution is nil.

Enter Additional Text:

- Automatic notifications will go out when the document is opened
- Choosing “Manual” allows you to go back at a time of your choosing to send notifications

SET-UP

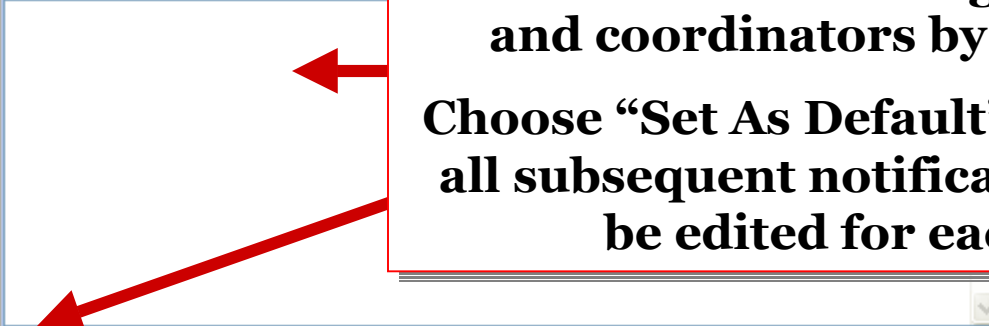
Setup Notifications (cont.)

Document Type: BensDocType
Document: General Review
Open Date: [not set]

The date your comments are due to %organization-name%
has been set/changed to %organization-duedate%.

If you have already reviewed and commented on this document,
please ignore this message.

Enter Additional Text:



Email text can be configured for your writers and coordinators by entering text here
Choose “Set As Default” to insert this text in all subsequent notifications (note: text can be edited for each document)

☐ Set As Default

This email is generated by the RevCom system.
Contact RevCom Technical support by email at ben@doxcelerate.com.

Once you are finished, click Apply

Apply

Revert to Defaults

SET-UP

Saving Your Activity Template



Assign Author

Super Department's Author



Assign Participants

17 Organizations



Setup Notification

Messages set; email mode: automatic

Description:

This activity template has been set up with author, participants, and email notifications as indicated by the blue check marks. It is now ready to save.

Save

as

General Review

Save & Rename

as

Delete

Delete General Review

Back

to Activity Templates Management

SET-UP

Creating a Workflow Template

**Create a workflow template by clicking on
Tools >> Manage Workflows**

The screenshot shows a web application interface for managing workflows. At the top is a navigation bar with tabs: Document, Accounts, Reports, Tools, and Help. Below the navigation bar, the user is identified as 'Admin - sandbox Administrator - Manage Workflows'. The main content area is titled 'Create a new workflow template or select an existing one:'. There are two sections: 'New:' and 'Existing:'. The 'New:' section has a text input field and a blue button. A red arrow points from the 'Tools >> Manage Workflows' instruction to the 'Tools' tab, and another red arrow points from the 'Enter a new name...' instruction to the 'New:' input field. The 'Existing:' section lists several workflow templates: 'Full Review', 'Complete Review Process including 1)Initial Screening Committee Review 2)Broad Review and Respo', 'Short Review', 'Short Review with an Initial Screening Committee Review and a final Screening Committee Review', 'Simultaneous Management Review' (highlighted with a yellow oval), and 'Simultaneous Management Review'. A red arrow points from the 'Once an workflow template is created...' instruction to the highlighted 'Simultaneous Management Review' template.

Document Accounts Reports Tools Help

User: Admin - sandbox Administrator - Manage Workflows

Create a new workflow template or select an existing one:

New:

Existing:

- Full Review
- Complete Review Process including 1)Initial Screening Committee Review 2)Broad Review and Respo
- Short Review
- Short Review with an Initial Screening Committee Review and a final Screening Committee Review
- Simultaneous Management Review
- Simultaneous Management Review

**Enter a new name for your
workflow template that well
describes the activities that will take
place during the entire review.**

Once an workflow template is created, you may edit it or delete it.

SET-UP

Creating a Workflow Template (cont.)

Workflow Name: New Workflow

Last Updated: 11/22/05 03:14 PM

Updated by: Benjamin Administrator Brown



Click the plus sign to assign an activity template to your workflow template

Description:

Just like the activity template, you can enter a description to a workflow template
Click save when you are finished

Save

as

New Workflow

Delete

Delete New Workflow

SET-UP

Creating a Workflow Template

(cont.)

There are two options in defining an activity for a workflow

Please define an activity

Enter a name:

Or select an existing one:

↓

1) Create a new activity (enter a new activity name then click “Create”) or

2) Use a previously defined activity template (choose an existing template then click “Select”)

Description:

Save your new Workflow Template

Save

as

New Workflow

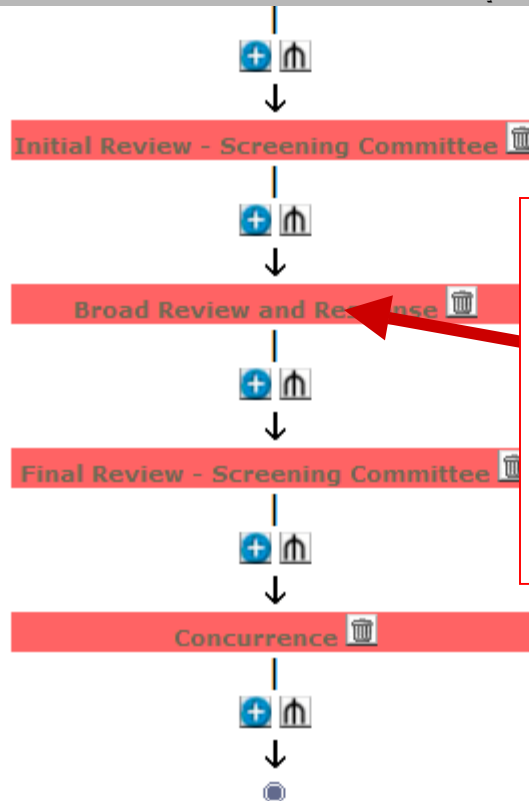
Delete

Delete New Workflow

SET-UP

Creating a Workflow Template

(cont.)



Both your workflow and activity templates have been created

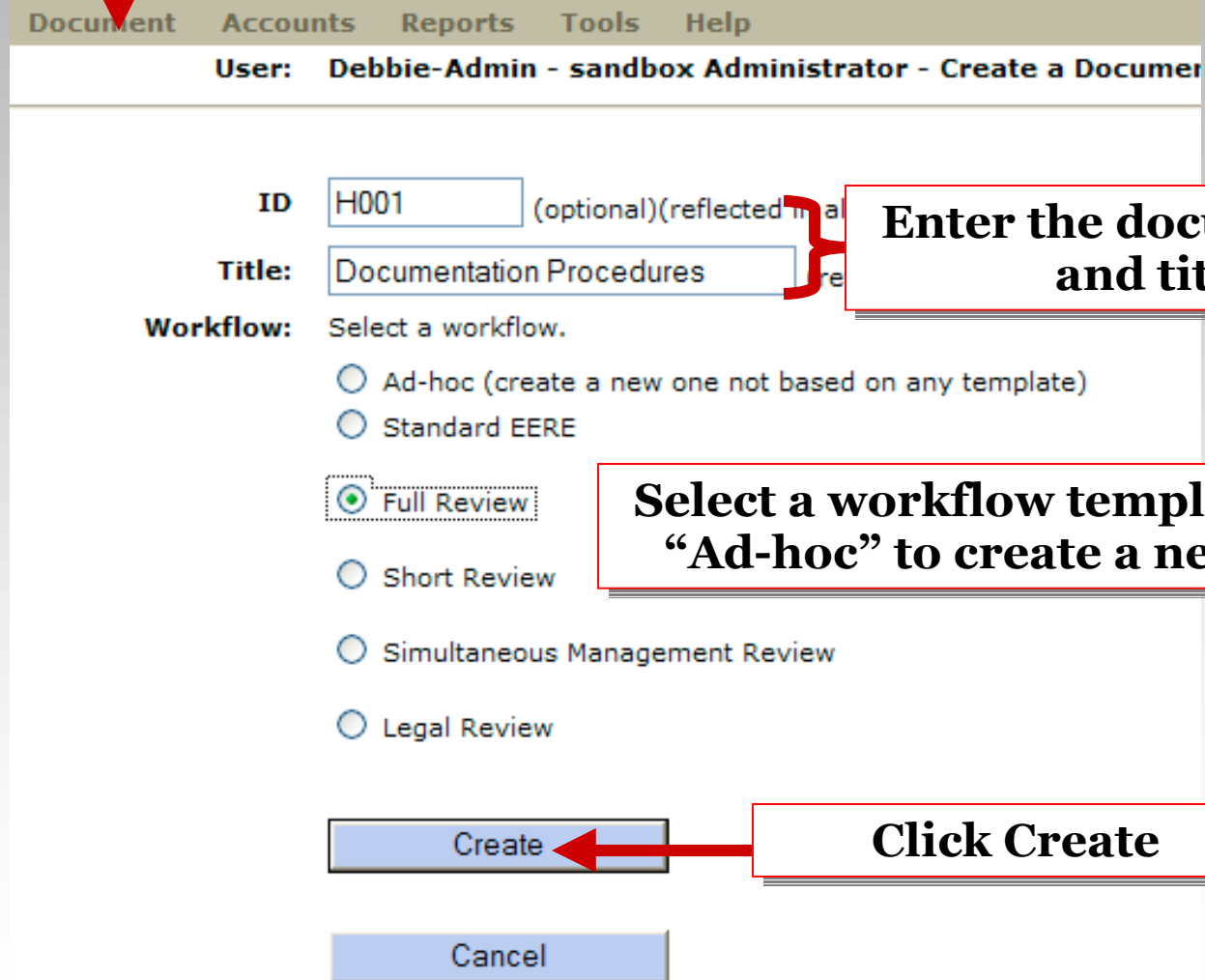
Clicking on the activity's name will display the setup of your previously created activity (which can be edited)

Description:

Complete Review Process including 1)Initial Screening Committee Review 2) Broad Review and Response 3)Final Screening Committee Review and 4) Concurrence

Loading a Document

To enter a new document version, click Document >> New



The screenshot shows a web application interface for creating a document. At the top is a navigation bar with links: Document, Accounts, Reports, Tools, and Help. Below this is a header bar indicating the user is 'Debbie-Admin - sandbox Administrator - Create a Document'. The main form area contains the following fields and options:

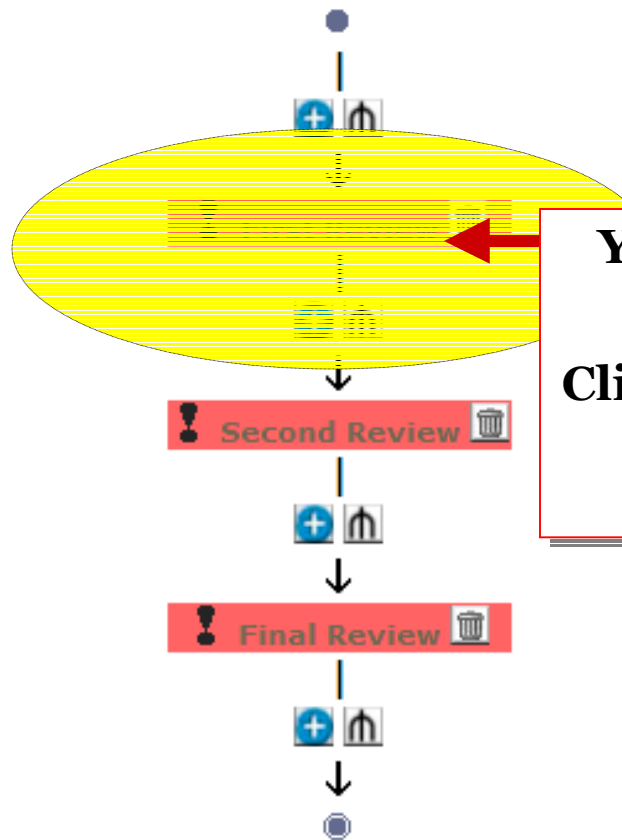
- ID:** A text input field containing 'H001'. To its right is the text '(optional)(reflected in all documents)'. A red bracket groups this field with the 'Title' field.
- Title:** A text input field containing 'Documentation Procedures'.
- Workflow:** A section titled 'Select a workflow.' with five radio button options:
 - Ad-hoc (create a new one not based on any template)
 - Standard EERE
 - Full Review** (This option is selected, indicated by a green dot in the radio button and a dashed border around the text.)
 - Short Review
 - Simultaneous Management Review
 - Legal Review
- Create:** A blue button with the text 'Create'. A red arrow points to this button from the 'Click Create' annotation.
- Cancel:** A blue button with the text 'Cancel'.

Enter the document ID and title

Select a workflow template or choose "Ad-hoc" to create a new workflow

Click Create

Loading a Document (cont.)



**Your document version has
now been created**

**Click on the first activity name
to continue the upload
process**

Activity Status

Document: H001 , Documentation Proce
Activity: First Review
Last Updated: 08/05/08 04:57 PM
Updated by: Debbie Jeffers
Status: Holding

The Name of your Version defaults to the activity name. To re-set the version name of your document, enter the new name here and click “Set Name”

First Review

Set Name

Upload Draft

Optional

Upload Original

Assign Author

Assign Participants

Set Due Dates

Setup Notification


10 Organizations

Messages set; email mode: automatic

**Start with
“Upload Draft”
and proceed
down the page
until setup is
complete.**

The checkmarks already present are from the activity template you selected. If you did not select an activity template, these settings can be made at this time. You can also make changes to any setting pre-defined in a template.

Upload the Draft for Review

To upload a WORD  document into RevCom, please enter or select a file path and click submit.

To upload a TEXT  document into RevCom, please enter or select a file path and click submit.

**You may upload a Word or text version of the document
Browse your local drive to find your file, then click “submit”**

Parsing the Draft for Review

The screenshot displays the RevCom HTML conversion tool interface. On the left, a list of styles is shown, categorized into 'Top Styles' and 'Detailed Styles'. The 'Top Styles' list includes 'div (1)', 'h1 (1)', 'MsoNormal (36)', 'p (36)', 'Section1 (1)', and 'text() (2)'. The 'Detailed Styles' list includes 'div/Section1/- (1)' and 'h1/- (1)'. To the right of the style lists are two sets of navigation buttons: 'Sections' with '<--' and '-->' buttons, and 'Paragraphs' with '<--' and '-->' buttons. Below these are two large empty rectangular boxes for preview. At the bottom of the main panel are buttons for 'Apply Styles' and 'Remove All Breaks'. Below the main panel is a 'Save Selections' button. At the very bottom, there are three sets of icons representing different document structures, each with a corresponding label: '(1/text()/-/)', '(2/div/Section1/-)', and '(3/h1/-)'. Below these is the text 'Aperiam ancillae' and another set of icons with the label '(5/p/MsoNormal/-)'.

Top Styles

- div (1)
- h1 (1)
- MsoNormal (36)
- p (36)
- Section1 (1)
- text() (2)

Detailed Styles

- div/Section1/- (1)
- h1/- (1)

Sections

Paragraphs

Apply Styles

Remove All Breaks

Save Selections

(1/text()/-/)

(2/div/Section1/-)

(3/h1/-)

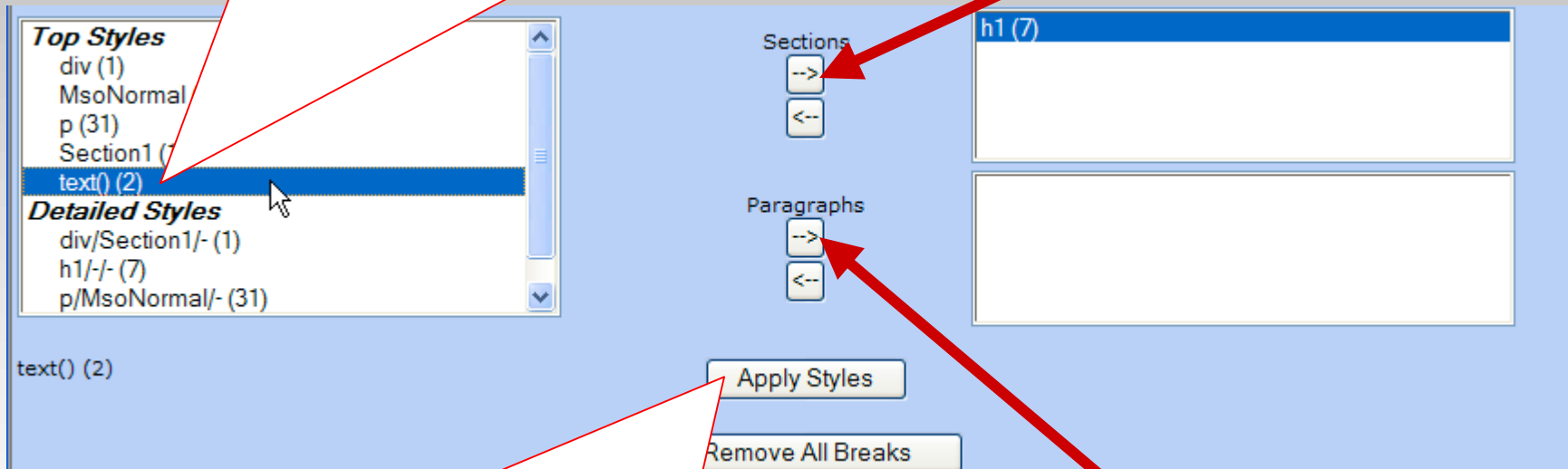
Aperiam ancillae

(5/p/MsoNormal/-)

RevCom's HTML conversion tool provides parsing options based on document tags in the original document. You can work with your document styles and tags to see what works best for you.

Parsing the Draft for Review (cont.)

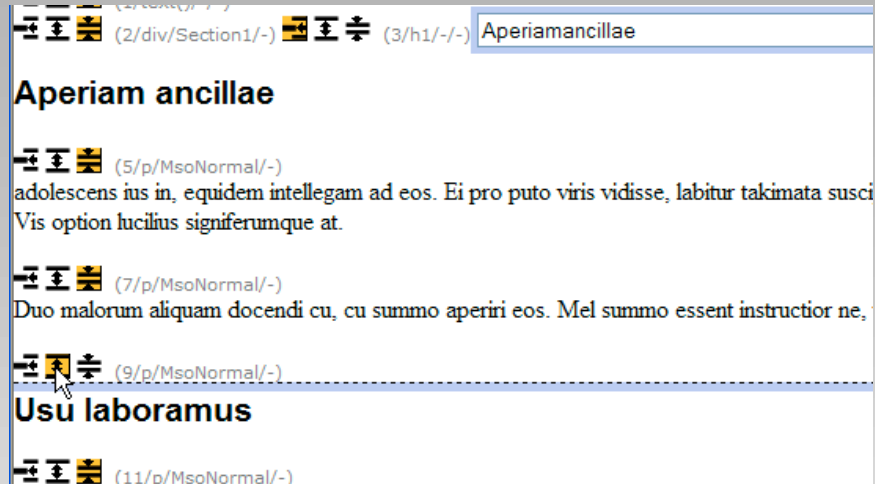
Select the styles you set up in your document for major section headings and click the “sections” arrow to include the style as a major named Section Heading.



Click the paragraph arrow to create a paragraph break at defined locations.

Click Apply Styles when complete.

Parsing the Draft for Review (cont.)



You can also manually choose your document breaks by choosing one of the icons to the left of each break option.

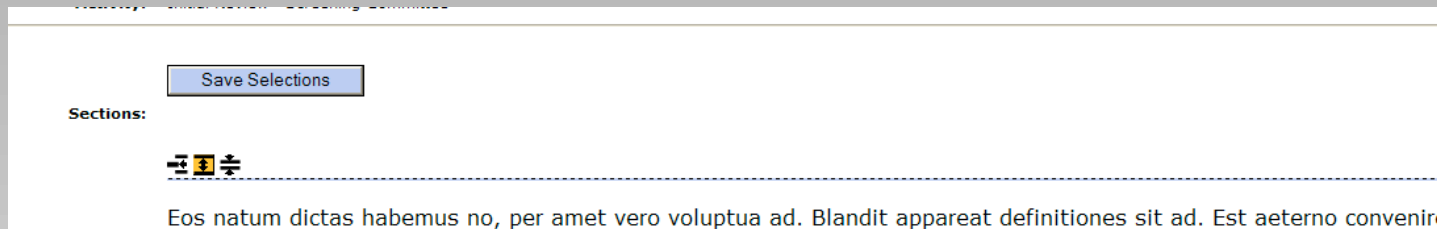
Insert Section Break 

Insert Paragraph Break 

Remove Break 

Sections will be listed on the left side of the user's RevCom screen. Paragraphs will display for each section selected on the right side of the user's RevCom screen. Each paragraph break will display an "Add Comment" button.

Parsing the Draft for Review (cont.)



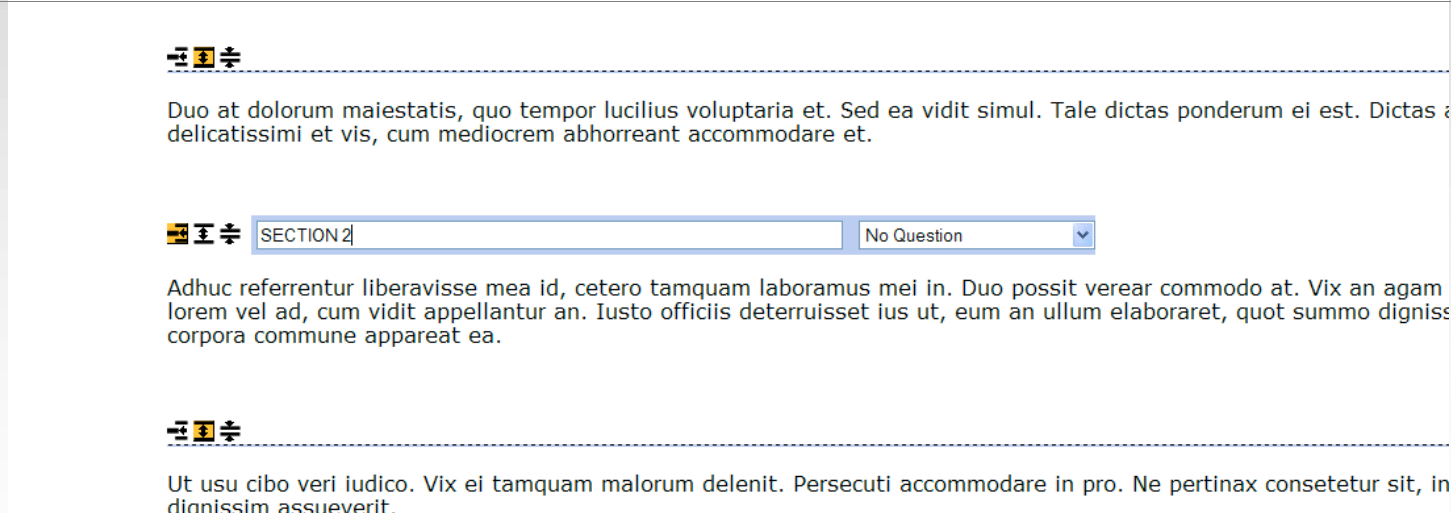
Save Selections

Sections:

SECTION 1

Eos natum dictas habemus no, per amet vero voluptua ad. Blandit appareat definitiones sit ad. Est aeterno convenire

Change the default Section Heading Name by clicking in the field and Typing the desired name.
After you have completed parsing, click “Save Selections” at the top and bottom of the parsing screen.



SECTION 2

No Question

Duo at dolorum maiestatis, quo tempor lucilius voluptaria et. Sed ea vidit simul. Tale dictas ponderum ei est. Dictas a delicatissimi et vis, cum mediocrem abhorreant accommodare et.

SECTION 3

Ut usu cibo veri iudico. Vix ei tamquam malorum delenit. Persecuti accommodare in pro. Ne pertinax consetetur sit, in diuissim assueverit.

Upload Original

The screenshot shows a web form titled 'Upload Original'. It has two main sections. The first section, 'File URL:', includes a text input field with 'http://' entered, a label 'Enter the URL of the original file:', a note 'must be in URL format, e.g., http://foia.state.gov/subdirectory/documents/abc.pdf', a warning 'PLEASE, TEST THE URL IN YOUR BROWSER BEFORE SUBMITTING IT', and a 'Submit' button. The second section, 'File Upload:', includes a text input field, a 'Browse...' button, a label 'Enter the path of the original file to upload.', and an 'Upload' button. Between the two sections is a separator '- OR -'.

File URL:
Enter the URL of the original file:
must be in URL format, e.g., http://foia.state.gov/subdirectory/documents/abc.pdf
PLEASE, TEST THE URL IN YOUR BROWSER BEFORE SUBMITTING IT

- OR -

File Upload:
Enter the path of the original file to upload.

The original file is usually the draft document in an un-parsed, original format, though it could be a redline strikeout version or other version.

When uploading the original, you can either link to it with a URL or upload a file from your local drive onto the RevCom server

Assign Author

Change the Author by selecting a user below:

Super Department

Super Department's Author

Department Number Two

Department 2 Author

Sponsored by the Department of Energy Building Technologies Program.

Operated by Doxcel Corporation

RevCom question: support-request@doxcelerate.com

Click on the name of the Author (if it has not been pre-defined in your template) to assign that individual to the Activity.

Changes can be made to template settings at this time.

Assign Participants

Phases:

1 Review ☒ 2 Response

Select “Response” to create a response phase for this activity whereby the writer responds to each comment

Participants:

☒ Select All

Clear All

Select Levels:

☒ All 1 ☒ All 2 ☒ All 3 ☒ All 4

Select the level of participants for this review

☒ Super Department SuperCoord

☒ Department Number Four Department 4 Coord

☒ Sub-Department Four Sub-Department 4 Coord

☒ Sub-Sub-Department Four Sub-Sub-Department 4 Coord

☒ Department Number One Department 1 Coord

☒ Sub-Department One Test Coord For Sub Department 1

☒ Sub-Sub-Department One Sub-Sub-Department 1 Coord

☒ Department Number Three Department 3 Coord

☒ Sub-Department Three Sub-Department 3 Coord

☒ Sub-Sub-Department Three Sub-Sub-Department 3 Coord

☒ ADA Ben

☒ CER Danny Branch

☒ CFO John Doe

☒ Department Number Two Department 2 Coord

☒ Sub-Department Two Sub-Department 2 Coord

Click assign to save your selections for this Activity.

Assign

Assign the above participants to this activity: **General Review**



Set Due Dates


**An example of a typical review period is 60 days
30 days for comments and 30 days for responses**

The current document status is: **Setup**


Open/Close Dates: Date format: MM/DD/YYYY


Review:

Open Date:  


Close Date: 


Responses:


Close Date: 

 Notify users days before local due date, if package not sent.

Review time between review levels is days.







to management of this activity

**In this example
RevCom is set to
notify users 3
days before their
local due date**

**The calendar icons can be
used to select dates**

**After due dates
are selected click
“Set Dates”**

**In this example 7 days between
each review level in the
organizational hierarchy is set**

Set Due Dates (cont.)

The current document status is: **Setup**

Confirmation: Please check the dates below and press confirm

Confirm

Open/Close Dates: Date format: MM/DD/YYYY

Review:

Open Date: 11/22/2005

Close Date: 12/25/2005

Responses:

Close Date: 01/11/2006

Notify users 3 days before local due date, if package not reviewed

Review time between review levels is 7 days.

Update

Cancel

When you are satisfied with due dates, click "Confirm"

Dates can be changed on this screen

Make the necessary changes and click "Update" then "Confirm."

Set Due Dates (cont.)

Review Due Dates By
Organizations:

Super Department	12/25/2005		Change
. Department Number Four	12/18/2005		
. . Sub-Department Four	12/11/2005		
. . . Sub-Sub-Department Four	12/04/2005		
. Department Number One	12/18/2005		
. . Sub-Department One	12/11/2005		
. . . Sub-Sub-Department One	12/04/2005		
. Department Number Three	12/18/2005		
. . Sub-Department Three	12/11/2005		
. . . Sub-Sub-Department Three	12/04/2005		
ADA	12/25/2005		Change
. CER	12/18/2005		
. CFO	12/18/2005		
Department Number Two	12/25/2005		Change
. Sub-Department Two	12/18/2005		
. . Sub-Sub-Department Two	12/11/2005		
ORO	12/25/2005		Change

The Set Due Dates page also shows the cascading due dates for all organizations participating in the review

From this screen dates can be changed within the global date range at the top levels. Save by pressing “Update” then “Confirm.”

Setup Notification

To set the email notification mode and any custom message content, click Apply near the bottom of this page.

Email Mode: (How should the email notifications be sent once the document associated with this activity becomes open ?)

☒ Automatic ☐ Manual

Message Content:

Below are the messages that will be sent to the different users when the document becomes open. You may add text using the text area below. You may save this text for subsequent messages by checking the Set As Default box.

Author Email:

RevCom: Due Date Set or

This is to inform you that the document is open for review and comment in RevCom.

Document Type: BensDocType

Document: General Review

Open Date: [not set]

The date comments are due is

The deadline for you to complete comment resolution is nil.

Enter Additional Text:

- Automatic notifications will go out when the document is opened
- Choosing “Manual” allows you to go back at a time of your choosing to send notifications

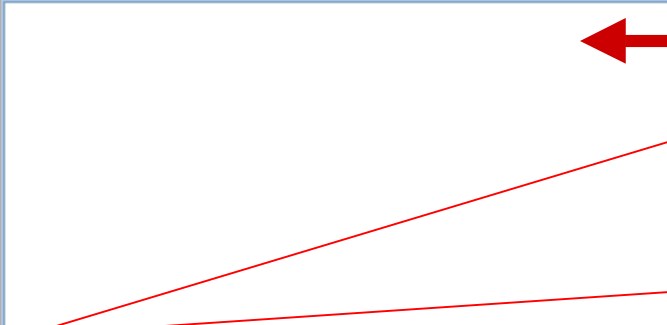
Setup Notification (cont.)

Document Type: BensDocType
Document: General Review
Open Date: [not set]

The date your comments are due to %organization-name%
has been set/changed to %organization-dued

If you have already reviewed and commented
please ignore this message.

Enter Additional Text:



☐ Set As Default

This email is generated by the RevCom system.
Contact RevCom Technical support by email at ben@doxcelerate.com.

Apply


Revert to Defaults

**Email text can be configured
for your Writers and
Coordinators by entering text
in the text boxes.**

**Choose “Set As Default” to
insert this text in all
subsequent notifications (note:
text can be edited for any
particular document)**

**Once you are
finished, click
Apply**

Survey Questions

First Review	Set Name
✓	Upload Draft 8 Sections (0 Questions)
✓	Upload Original http://sandbox.doxcelerate.com/pdfs/RevCom-1-8209-latintext.doc 
✓	Assign Author Julie Campbell
✓	
✓	
✓	Setup Notification Messages set;email mode: automatic

GO

Survey or concurrence questions can be added to a document by clicking Sections/Questions.
Warning! Clicking on Upload Draft will force you to reload and re-parse your draft.

Survey Questions (cont.)

There are three different types of questions

Sections:

Section 1

No Question

Survey Question Type

No Question

Multiple Answers

Single Answer

Numeric

- Choose the drop-down box to the right of any section
- Select your question type
- Enter your choices – adding more choices by clicking “Add Choice”
- If you want this question to appear in all sections of the document, click “Copy To All”

Section 1a

Single answer

Field Radio:

Question: Will this effect the way you work?

Choice 1: Yes

Choice 2: No

Choice 3: Maybe

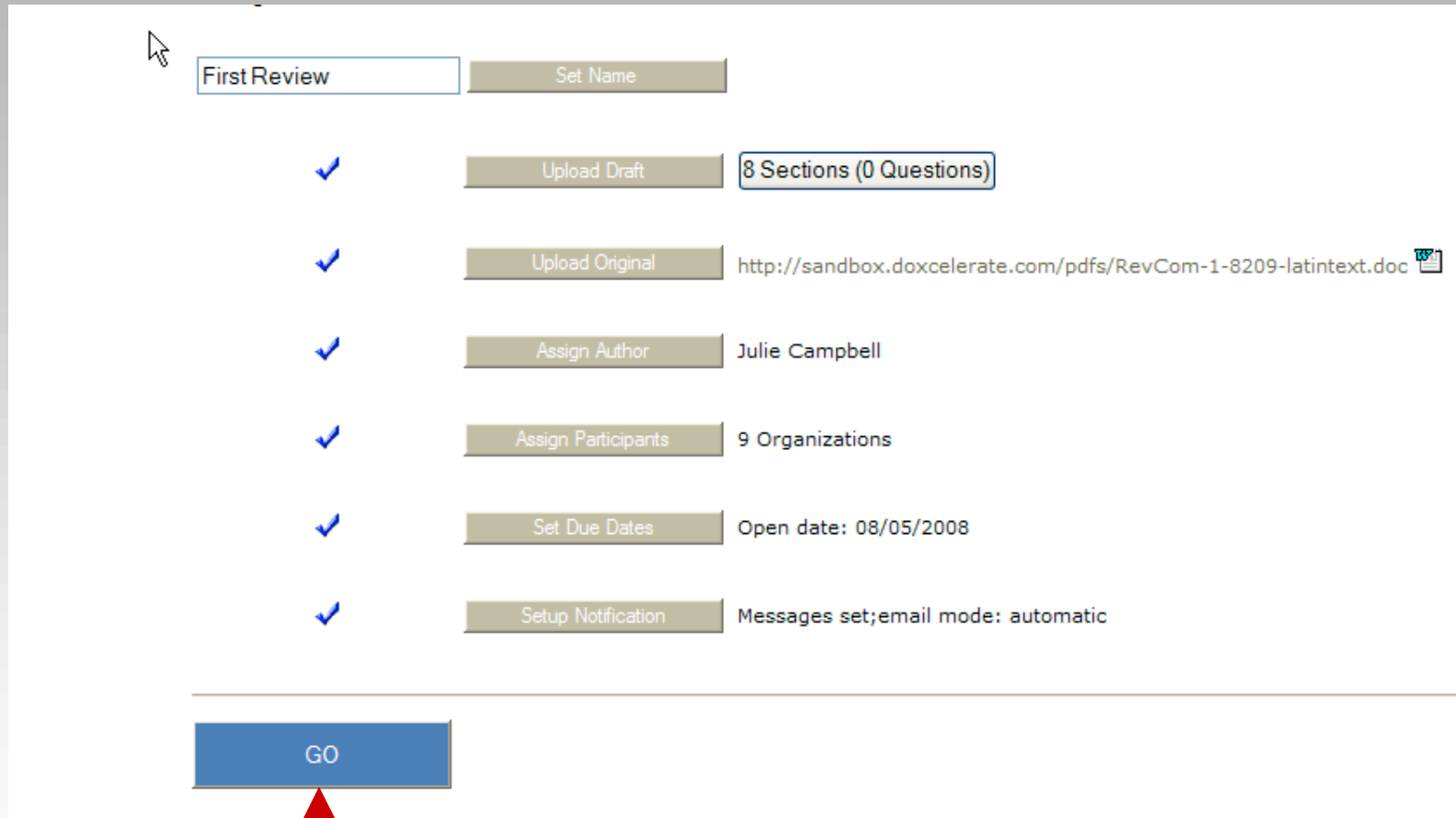
Choice 4: I don't know.

Add Choice


Copy To All

When you have completed your survey questions, click the “Save Selections” button at the top or bottom of your screen

Survey Questions (cont.)



The screenshot shows a web interface for configuring a survey. At the top, there is a tab labeled "First Review" and a button labeled "Set Name". Below this is a checklist of six steps, each with a blue checkmark to its left and a button to its right:

- ☒ **Upload Draft** 8 Sections (0 Questions)
- ☒ **Upload Original** <http://sandbox.doxcelerate.com/pdfs/RevCom-1-8209-latintext.doc> 
- ☒ **Assign Author** Julie Campbell
- ☒ **Assign Participants** 9 Organizations
- ☒ **Set Due Dates** Open date: 08/05/2008
- ☒ **Setup Notification** Messages set;email mode: automatic

At the bottom of the interface is a large blue button labeled "GO". A red arrow points from the text box below to this button.

Once each of these steps is completed (confirmed by the blue check marks) you are ready to open the document by clicking “GO”

Ready To Open

This document is set to open on 04/02/2008.

If you choose YES, it may be opened instantly.

Choose NO to change the document settings.

FYI: notifications will be sent by the system automatically upon opening.

☒ Yes

☐ No

Submit

Confirm the open date for your document. If your document is set to open on today's date, then the document will open immediately.

Future open dates will open accordingly.

Click “Yes” and “Submit”

The Document Activity is Open

Document has been opened (actual open date set to today).

Email notifications have been queued for delivery.

User: DoxSupport - sandbox Administrator - Activity Status

Document: H001, Documentation Procedures, F
Activity: First Review
Last Updated: 08/05/08 04:35 PM
Updated by: DoxSupport
Status: Running

First Review Set Name

✓ Upload Draft 8 Sections (0 Questions)

✓ Upload Original <http://sandbox.doxcelerate.com/pdfs/>

✓ Assign Author Julie Campbell

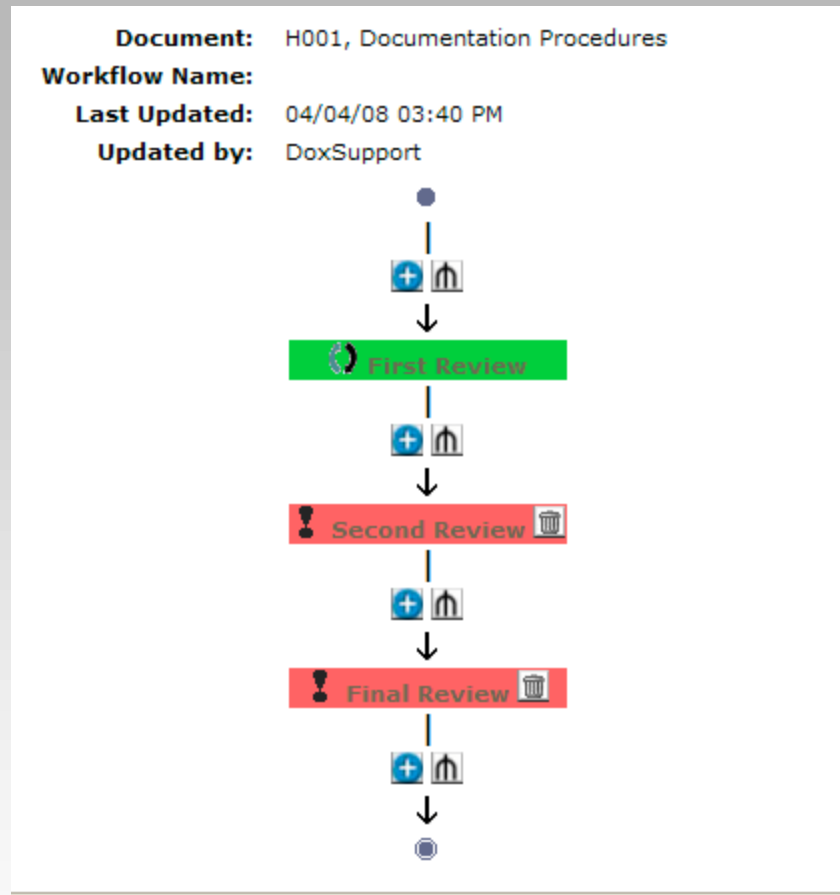
✓ Assign Participants 9 Organizations

✓ Set Due Dates Open date: 08/05/2008

The document has been opened and the email notifications have gone out

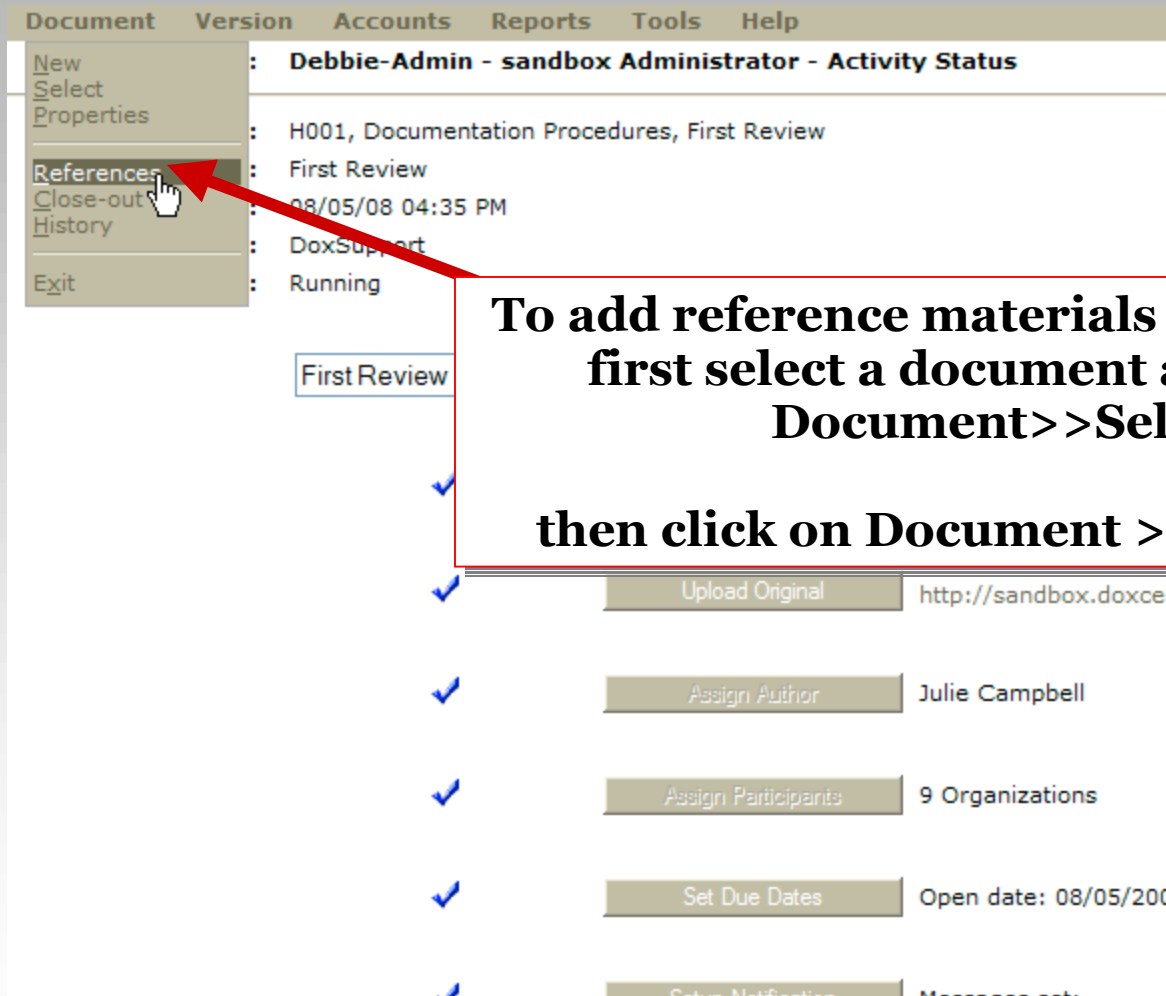
The Document Activity is Open

(cont.)



In a view of the workflow we see that the document activity “First Review” is open.

Adding References



Document Version Accounts Reports Tools Help

New
Select
Properties
References
Close-out
History
Exit

: Debbie-Admin - sandbox Administrator - Activity Status

: H001, Documentation Procedures, First Review

: First Review

: 08/05/08 04:35 PM

: DoxSupport

: Running

First Review

✓

✓

✓

✓

✓

✓

Upload Original <http://sandbox.doxce>

Assign Author Julie Campbell

Assign Participants 9 Organizations

Set Due Dates Open date: 08/05/200

Setup Notification Messages etc.

**To add reference materials to a document
first select a document activity via
Document>>Select**

then click on Document >> References

Adding References (cont.)

Enter the title and URL of a reference document:

Reference Title:

Reference Summary:

Reference URL:

must be in URL format, e.g., <http://foia.state.gov/subdirectory/documents/abc.pdf>
PLEASE, TEST THE URL IN YOUR BROWSER BEFORE SUBMITTING IT

- OR -

Enter the title and the path of a reference document to upload.

Doc Title:

Doc Summary:

Doc Path:

There are two methods of adding reference documents

- **Submit a URL to link to a reference document**
- **Upload a reference document from your local drive using browse**

A “Summary” field is available to describe the loaded reference to users.

Custom Reports

1- Select type of comments:
☒ Major ☐ Minor ☐ Both

2- Select Organization to display:
All Organizations - By Name
Top Organizations
ORG-A
ORG-A1

3- Show Subordinate Levels:
☐ None ☒ Direct (one level) ☐ All (tree)

5- Show Comment Responses:
☐ Yes ☒ No

6- Select Paragraph to display:
All Paragraphs
Eos natus dictas habemus no, per an
Duo at dolorum maiestatis, quo tempo
SECTION 2

7- Show Paragraph Text:
☐ Yes ☒ No

Submit

**A document must be selected in order to generate a report
Document>>Select**

**Generate and print custom (ad hoc) reports by choosing
Reports>>Custom from the menu.**

Report generation options include:

- **Type of comment**
- **Organization**
- **Levels**
- **Responses**
- **Sections to display**
- **Paragraph text**

Custom Reports (cont.)

The Document Status report lists each document in the RevCom system. This report reveals:

- **Document Title**
- **Number of accesses to date for each document**
- **Number of comments**
 - Total**
 - Major Comments**
 - Suggested Comments**
- **Workflow status for each document**
 - Open for Comment**
 - Resolution**
 - Completed**
 - Cancelled**
 - Withdrawn**
 - Final**
- **Planned and Actual dates the document entered (or will enter) each of the workflow states**

Document DOE O 123456 (Open)

DOE O 123456, Dpt 2 Review (Open)

14 Accesses, 17 Comments (12 Major, 5 Suggested)

State	Opened	Closed	Resolved
Plan	08/09/2005	09/09/2005	09/30/2005
Actual	08/09/2005	09/09/2005	09/30/2005

Document LANL TEST DOCUMENT 1 (Open)

LANL TEST DOCUMENT 1, test (Completed)

7 Accesses, 1 Comments (1 Major, 0 Suggested)

State	Opened	Closed	Resolved
Plan	07/06/2005	07/27/2005	
Actual	07/06/2005	07/29/2005	

Document LANL TEST DOCUMENT 2 (Open)

LANL TEST DOCUMENT 2, Review Process (Completed)

7 Accesses, 5 Comments (5 Major, 0 Suggested)

State	Opened	Closed	Resolved
Plan	07/06/2005	07/27/2005	
Actual	07/06/2005	07/27/2005	

Document m345.2 , Manual for the Safety (Open)

m345.2 , Manual for the Safety, Review (Completed)

3 Accesses, 2 Comments (1 Major, 1 Suggested)

State	Opened	Closed	Resolved
Plan	07/18/2005	08/10/2005	
Actual	07/18/2005	08/10/2005	

Document m345.2, Manual for the Safety (Open)

m345.2, Manual for the Safety, Review Process (Open)

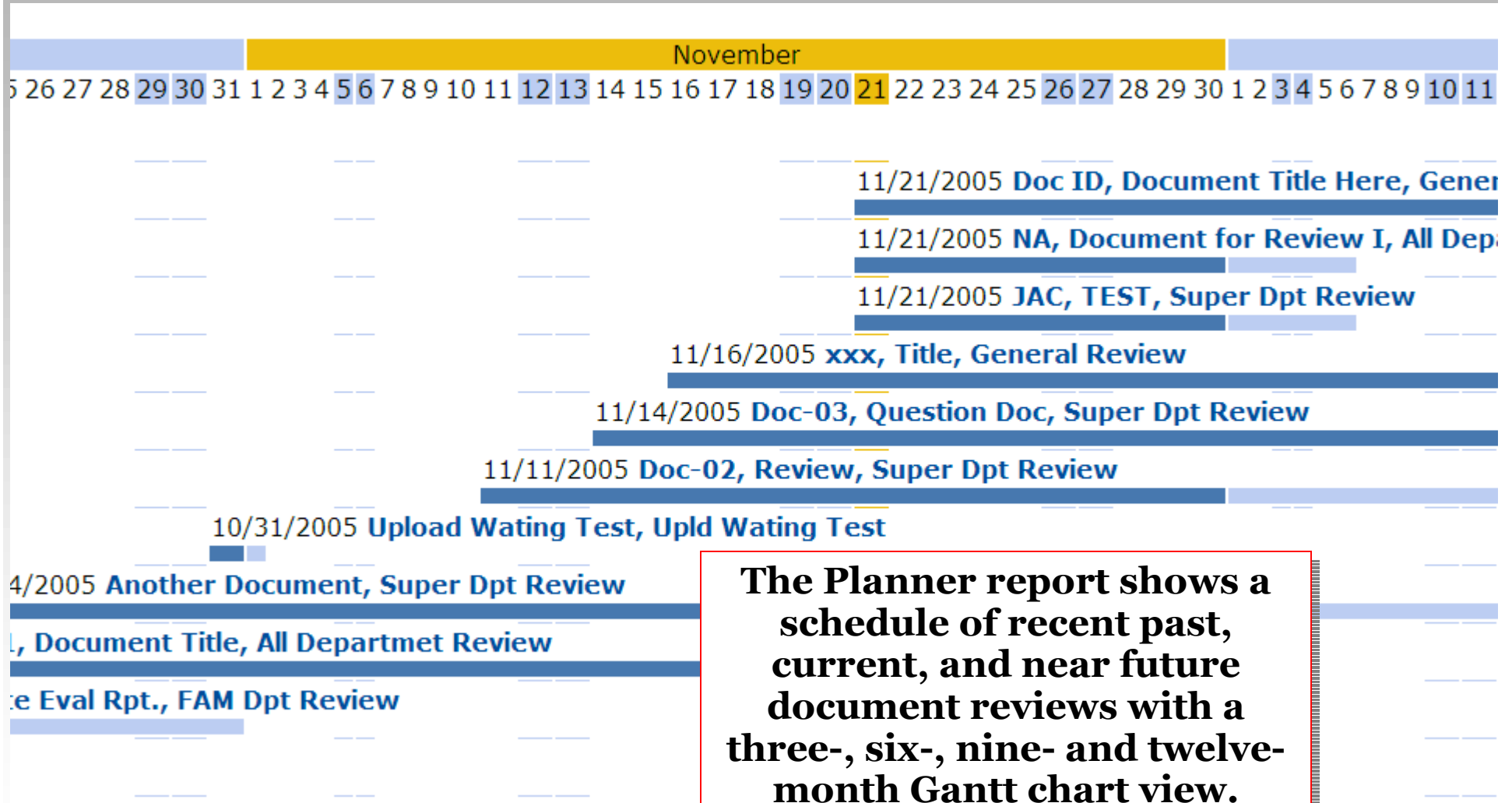
4 Accesses, 1 Comments (1 Major, 0 Suggested)

State	Opened	Closed	Resolved
Plan	07/18/2005	07/29/2005	08/12/2005
Actual	07/18/2005	07/29/2005	08/12/2005

Document New LANL, IMP 763 (Open)

New LANL, IMP 763, Review Process (Open)

Planner



Cancel Document

Document	Version	Accounts	Reports	Tools	Help
User: AdminBen - BensDocType Administrator - Cancel a Version					
<p>Are you sure you want to cancel this activity General Review containing document Doc ID-2, Important Document, General Review ?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="button" value="Submit"/></p>					

Version >> Cancel cancels a document version and places it in the “Done” state

Document Properties

Document	Accounts	Reports	Tools	Help
User: AdminBen - BensDocType Administrator - Update Document Properties				
Document: Doc ID-2, Important Document				
ID	<input type="text" value="Doc ID-2"/> (optional)(reflected in all versions)			
Title:	<input type="text" value="Important Document"/> (reflected in all versions)			
<input type="button" value="Update"/>				
<input type="button" value="Manage Workflow"/>				

Document >> Properties enables modification of the document ID or title

Questions?

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